

**REQUEST FOR QUALIFICATIONS
HeatSmart Northampton Program 2017**

Release Date: June 14, 2017

Questions Due: 4 p.m. June 21, 2017

Qualification Statements Due: 3 p.m. July 5, 2017

Deliver completed statements of qualification to:

Central Services Department
c/o Chris Mason, Energy & Sustainability Officer
Memorial Hall
240 Main Street, Suite #3
Northampton, MA 01060

Table of Contents

I. INTRODUCTION

- A. Overview
- B. Program Description and Goals
- C. Customer Acquisition
- D. Funding
- E. Eligible Applicants
- F. Preferred Qualifications
- G. Application Instructions

II. SCOPE OF WORK AND TIMELINE

- A. Scope of Work
- B. Timeline
- C. Questions and Contact Information

III. STATEMENT OF QUALIFICATIONS SUBMISSION REQUIREMENTS

- A. Executive Summary
- B. Company Description
- C. Company Qualifications and Experience
- D. Key Staff and Partners
- E. Work Plan
- F. Attachments

IV. REVIEW PROCESS

APPENDIX

- Attachment 1 – Cover Sheet and Application Checklist
- Attachment 2 – Price Proposal and Product Specifications
- Attachment 3 – Reference List
- Attachment 4 – Example copies of standard agreement and customer quote
- Attachment 5 – Copies of relevant licenses, insurance, and certifications

I. INTRODUCTION

A. Overview

The City of Northampton (“Northampton”) is releasing this request for qualifications (“RFQ”) for cold-climate air source heat pump (“ASHP”) installers (“Installers”) to participate in the 2017 HeatSmart Northampton Program (“Program”). Northampton will implement a campaign from July-November 2017 that seeks to drive community adoption of ASHP systems and building weatherization upgrades through a community group purchasing and outreach model in order to reduce greenhouse gas emissions throughout the city.

Northampton is seeking statements of qualifications from multiple installers who can provide ASHP installations to residents and businesses through the Program. Northampton will aggregate leads in an efficient manner to reduce the cost of customer engagement and acquisition for installers and promote the selected installer(s) through community-driven outreach with the goal of ensuring installers can offer transparent, reduced installation pricing to customers. It is anticipated that Northampton will set goals of 300 leads and 60 installations for the Program. In addition to accelerating growth in the local ASHP market, Northampton also seeks to support local businesses engaged in providing clean energy and energy efficiency services.

The purpose of this RFQ is to select one or more Installers who can provide ASHP installation services to Northampton residents and businesses. Installer qualifications, quality of the statement of qualifications, proposed equipment and service offerings, proposed pricing, ability to directly support customer outreach, previous performance and record of customer service, certifications, and reference checks will be factors in the selection process.

Installers are invited to submit proposals individually or collaborate with other firm(s) to submit a joint proposal—particularly if a joint proposal could enable the team to offer home energy assessments and/or weatherization services in conjunction with heat pump installations or increase installation capacity to meet an influx in demand.

B. Program Description and Goals

The City of Northampton aims to be a national leader in combating climate change, having set goals for reducing greenhouse gas (GHG) emissions by 80% by 2050 from 2000 levels, increasing deployment of renewable energy and energy efficiency technologies, and promoting local economic development around clean energy technologies. Building off of the successful 2013 Solarize Northampton campaign, Northampton has developed the HeatSmart Northampton program to drive reductions in thermal energy consumption and emissions and provide opportunities for energy savings and improved home comfort to residents.

HeatSmart Northampton will be led by municipal officials, local volunteers, supporting partners, and competitively-selected Installers to implement a community group purchasing, outreach, and education campaign on behalf of the community. Through the Program, Northampton seeks to:

- Increase education and awareness of ASHPs and associated benefits
- Increase adoption of ASHPs in conjunction with weatherization and energy efficiency upgrades in local homes and businesses
- Reduce installation costs associated with ASHPs
- Reduce GHG emissions to support the goals outlined in Sustainable Northampton
- Increase awareness of the role of thermal energy consumption in contributing to GHG emissions
- Support local businesses engaged in providing clean energy and energy efficiency services

All systems installed through the Program must be cold-climate air source heat pumps.

For purposes of this program, cold-climate air source heat pumps are defined as central and mini-split (ductless or ducted) ASHPs:

- Certified by the **Northeast Energy Efficiency Partnerships (NEEP)** Cold Climate Air-Source Heat Pump Specification (<http://www.neep.org/initiatives/high-efficiency-products/emerging-technologies/ashp/cold-climate-air-source-heat-pump>)
- Listed as Qualifying Equipment under the **Massachusetts Clean Energy Center (MassCEC)** Clean Heating & Cooling Program – Small-Scale Air-Source Heat Pump Program (<http://files.masscec.com/get-clean-energy/business/clean-heating-cooling/ASHPPProgramManualSmallScale.pdf>); and
- Meeting the relevant efficiency requirements for rebates under the **Mass Save** Mini-Split Heat Pump (<http://www.masssave.com/en/residential/heating-and-cooling/cooling-equipment-rebates/mshp>) and Central Heat Pump (<http://www.masssave.com/en/residential/heating-and-cooling/cooling-equipment-rebates/cac>) rebate programs

Northampton will engage in extensive, community-led outreach to promote the Program.

Outreach activities are expected to include:

- **Educational, Meet the Installer workshops** where residents can learn more about the Program, heat pumps, and sign up with the selected installers
- **Open houses** at the homes of residents who have installed heat pumps
- **Social media, email blasts, and other online outreach**
- **Print and earned media placements** (e.g. local newspapers, radio, TV)
- **Signage, handouts, and direct mailing**
- **Tabling at farmer's markets and other local community events**

Northampton is in the process of identifying a roster of volunteers to spearhead outreach. A team of up to 12 volunteers from local community organizations have already expressed strong interest in partnering with the city on this program. Northampton is working with ener-G-save (<http://ener-g-save.com/>), which has completed infrared imaging of every home in Northampton

and will competitively select home performance contractors to complete home energy assessments and weatherization upgrades. Northampton will also build off of local market analyses to identify the best candidates for heat pumps and improve the targeting of outreach.

Selected Installers will be expected to support these outreach efforts (e.g. attending events, presenting at workshops, reviewing educational materials).

Northampton will also receive technical assistance from Meister Consultants Group (MCG) to evaluate proposals and support Program design, implementation, and evaluation.

C. Customer Acquisition

The Program aims to drive deployment of ASHP systems in Northampton homes and businesses. Prospective customers will have the opportunity to sign up to work with any of the selected Installer(s) at in-person events or through an online intake form hosted on the Program website. Customers will be encouraged to select one Installer to work with (i.e. through signing up directly with the installer at an event or selecting the Installer on an online intake form) to reduce customer acquisition costs to installers, though customers may request quotes from multiple selected Installers if they so choose (or may otherwise receive quotes from all participating Installers if they indicate no preference).

In addition to this customer acquisition pathway through the Program website and in-person events, Northampton will be enabling low-income residents who sign up through the Program to utilize income-eligible programs managed by Community Action.

D. Funding

No direct funding will be provided to Installers by Northampton as part of this Program. Northampton will provide in-kind contributions of staff time and materials to support marketing and community outreach and is weighing options for providing additional local incentives for Program participants. Like Northampton's past Solarize program, HeatSmart Northampton will leverage the City's education and marketing efforts, volunteer outreach, and the selected Installers and pricing discounts to increase technology adoption among Northampton residents and businesses.

E. Eligible Applicants

Heating ventilation and air conditioning (HVAC) contractors, oil dealers, and other home energy contractors are invited to submit statements of qualification to serve as Installers under the Program. In order for an Installer to be eligible to submit a proposal, the Installer must:

- Be a Primary Installer in (i.e. eligible to participate in and submit rebates to) the MassCEC Clean Heating & Cooling Program – Small-Scale Air-Source Heat Pump Program
- Be, at minimum, a contractor licensed to install ASHPs in accordance with all applicable federal, state, and local codes, standards, and permitting requirements and manufacturer specifications, and hold all necessary insurance.

- Have installed a minimum of 10 cold-climate ASHPs within Hampshire County and can provide no less than five references from past customers
- Submit a statement of qualification that meets all of the submission requirements outlined below in Section III by no later than **Tuesday, July 5, 2017 at 3 p.m.**
- Be able to provide all services described in the Scope of Work (Section II-A) to residents and businesses in the City of Northampton

F. Preferred Qualifications

Installers that can provide the following services in addition to the eligibility requirements are preferred:

- Hold high-level certifications to install ASHPs from third-party organizations (e.g. manufacturers, relevant non-profit certification organizations)
- Demonstrate experience in marketing ASHPs and in supporting similar community outreach programs
- Provide a clear, transparent pricing and/or discount structure
- Demonstrate ability to meet a significant increase in customer leads and maintain prompt customer service throughout the duration of the Program
- Demonstrate a strong commitment to customer service (e.g. through customer testimonials/references, ratings at third-party organizations such as the Better Business Bureau, Yelp, Home Advisor, and other online/social media platforms)
- Demonstrate a strong commitment to supporting customers in implementing needed air sealing and weatherization upgrades and improvements
- Demonstrate experience installing ASHPs in homes with existing central heating systems either as a supplemental heating/cooling system or as a replacement system.

G. Application Instructions

1. Use the forms in Attachments 1 through 5 provided in this document and complete all of the submission requirements as called for in this document (specifically as described in Section III of this document) and in any addenda to this document published by the city.
2. Send your Statement of Qualifications (SOQ) to:

Central Services Department
c/o Chris Mason, Energy & Sustainability Officer
Memorial Hall
240 Main Street, Suite #3
Northampton, MA 01060.

SOQs are due by 3:00 p.m. sharp on July 5, 2017. SOQs must be in a sealed envelope. Be sure to confirm and note any addenda on the space provided on the form in Attachment 1

II. SCOPE OF WORK AND TIMELINE

A. Scope of Work

Installers selected for the 2017 HeatSmart Northampton Program will have primary responsibility for installing ASHP systems in homes and businesses that sign up to participate in the Program, including:

- Managing customer leads
- Performing site assessments and heating load calculations
- Providing general customer service and prompt response time to leads and customer inquiries
- Contracting, installing, and performing all other functions typically associated with the ASHP sales and installation process
- Taking steps to ensure proper performance of the ASHP system with the existing backup system (if applicable) such as programming a customer's thermostats and coordinating the existing/backup heating and ASHP control systems for optimal operation
- Supporting the customer in submitting all eligible rebate applications and identifying financing programs

Additionally, selected Installers will:

- Support the Northampton volunteer team's public outreach, education events and other marketing activities coordinated by Northampton as part of the Program
- Coordinate with Northampton representatives to develop a community marketing strategy and marketing and educational content
- Provide additional training to any Program volunteers (as necessary)
- Provide educational and marketing materials for relevant programs to prospective customers. This could include information on heat pump rebate programs (e.g. Mass Save and MassCEC) and financing options (e.g. HEAT Loan), as well as incentives for other complementary energy services and ener-G-save
- Encourage, at a minimum, completion of Mass Save incentive-eligible weatherization upgrades along with the installation of ASHP systems
- Provide customers with training on the operation and maintenance of the new ASHP systems, as well as options for ongoing equipment maintenance service
- Provide warranties of at least one (1) year for workmanship and at least eight (8) years for parts
- Keep detailed records of system installations (e.g. models installed, system costs, total rebates provided, financing programs utilized) and lost customer leads (including reasons for loss of lead). Installers will be required to provide Northampton with customer reports (using a template provided by the City) every week throughout the course of the Program, as well as a final report upon completion of the Program

B. Timeline

A preliminary timeline for the Program is outlined below. This is an estimated timeline, and dates are subject to change.

All contracts must be signed by program close, though contracted installations may occur up to one year after the conclusion of the program. Installers will be required to provide monthly reports on the status of contracts that have been signed but not yet installed until they are all resolved.

2017 HeatSmart Northampton Program	Preliminary Timeline
RFQ for ASHP installers released	June 14, 2017
Deadline to submit questions	June 21, 2017, 4 PM
Responses to questions released	June 27, 2017, 3 PM
Installer statements of qualification due	July 5, 2017, 3 PM
Review/Interview/ Announce selected ASHP installers	July 5-14
Notice of Award/Contract	July 14
Planning/materials gathering	July 17-21
Program launch	July 24, 2017
Program closes	November 22, 2017

C. Questions and Contact Information

Prospective Installers are encouraged to submit questions related to this RFQ. Please submit all questions to:

Chris Mason, City of Northampton Energy & Sustainability Officer at:
cmason@northamptonma.gov

All questions must be in writing and must be received by 4 PM, June 21, 2017.

III. STATEMENT OF QUALIFICATIONS SUBMISSION REQUIREMENTS

Statements of qualification submitted in response to this RFQ must detail how the Installer proposes to carry out the tasks outlined in the Scope of Work. Statements of qualification must also contain information on the qualifications and experience of the Installer and its key personnel.

Statements of qualification must include the following:

A. Executive Summary: The Executive Summary should summarize the highlights, key features, and distinguishing points of the proposal; identify why the Installer is interested in participating in the HeatSmart Northampton program; and highlight any unique challenges identified by the Installer as well as proposed solutions to address them.

B. Company Description

This section must include:

- Company name and address
- Name, address, phone number and e-mail address of primary contact at Company
- Statement of ownership: Describe the type of business entity (sole proprietorship, corporation, LLC, or other), and list the majority and minority owners

C. Company Qualifications and Experience

This section must include:

- A description of the Installer, including company size, financial stability, location, capacity to serve Northampton (e.g. number of installs per week), and access to various supply chains
- A statement of the Installer's qualifications and experience to complete the scope of work in this RFQ (e.g. describe company experience designing, installing and servicing cold climate ASHPs in Northampton and neighboring cities and towns) Include:
 - experience working with single-family homes, multi-unit/condominium buildings, and small businesses;
 - total number of cold climate ASHP installations completed in Hampshire County broken out by the number of installs for new construction and the number of systems added to existing homes with existing central heating systems.
 - Process used, if any, to size ASHP systems
 - Process used, if any, to integrate operation of ASHP systems with existing central heating systems
 - Process used, if any, to coordinate with home performance contractors for completing home energy assessments (e.g., describe any home performance contractor(s) that you refer customers to or frequently collaborate with)

- A statement demonstrating ability to manage an influx of customers leads and multiple projects at the same time within budget and schedule throughout the duration of the Program, as well as achieving high levels of customer satisfaction and ensuring proper recycling and disposal of replaced equipment
- A statement of current licenses and insurance held. Licenses must be current, and insurance must meet the minimum insurance requirements detailed in Section I-E (Eligible Applicants). **Copies of licenses and insurance certificates must be included in Attachment 5 to the statement.**
- A statement of relevant third-party certifications held, including a list of relevant ASHP trainings completed by Installer staff that will be providing installation services. **Copies of certifications and verification of training attendance should be provided in Attachment 5 to the statement.**
- A list of at least 5 client references and their contact information. References must be able to comment on their satisfaction with their ASHP installations, Installer business practices, and customer satisfaction. **References should be provided in Attachment 3 to the statement.**

D. Key Staff and Partners

This section must include:

- Names and company affiliations of key staff, including any anticipated subcontractors
- Roles, Responsibilities and Qualifications of key staff, including brief description of primary tasks to be performed by each and training and experience relevant to successful completion of tasks
- Information should be included on the overall Installer team, such as technical competencies, work management approaches.
- Provide an organizational chart showing internal relationships and functions, and anticipated interactions with Northampton staff and volunteer outreach and marketing team.

E. Work Plan

This section must include:

- Proposed outreach and marketing approach, which outlines a plan that would be used to motivate residents to install an ASHP under the Program including information on how the Installer will work with program staff to implement this plan. Information on relevant sales and outreach experience held by the Installer should also be provided.
- Proposed timeline for a standard site evaluation and installation, from initial contact to contracting to installation, as well as other relevant steps required for a successful ASHP installation.
- Plan to meet the proposed timeline, as well as provide highly-responsive customer service and timeline response to leads and inquiries.
- Description of customer relationship management (CRM) database utilization/lead management process
- Plan for customer remediation, warranty and option for service support for installed product(s)

- Customer complaint resolution process
- Proposed process for sites that are not feasible for ASHP installation, including but not limited to options for directing customers to other renewable or energy efficiency programs, technology options, and service providers
- Plan to address the Installer's geographic proximity to Northampton and how this will affect services provided.

F. Attachments

A series of attachments are also required:

Attachment 1: Cover Sheet and Application Checklist

Complete "Attachment 1: Cover Sheet and Application Checklist" including acknowledgement of all addenda for this project and the signature of someone authorized to submit the proposal on behalf of the company and submit as part of statement of qualifications.

Attachment 2: Price Proposal and Product Specifications

Complete "Attachment 2: Price proposal and product specifications" and submit as part of statement of qualifications

Attachment 3: References

Complete "Attachment 3: References" and submit as part of statement of qualifications. Provide a list of at least 5 client references and their contact information. References must be able to comment on their satisfaction with their ASHP installations, Installer's business practices and customer service.

Attachment 4: Copies of standard agreement and sample quote which will be provided to customers under the Program

Attachment 5: Copies of relevant licenses, insurance, certificates, and resumes for the Installer and key personnel as applicable

IV. REVIEW PROCESS

All statements of qualification must meet the program objectives and be responsive to the relevant scope of work and requirements outlined above.

Application Checklist: Applications must meet a threshold review before they will be provided to the RFQ review team. To meet the threshold review, statements must include the following:

- Cover letter
- Statement of qualifications that includes all required sections and completed attachments: Price Proposal and Product Specifications; References; Copies of standard

agreement and sample quote; Copies of relevant licenses, insurance, certificates, and resumes)

- Installer is, at minimum, licensed to install residential-scale ASHPs in the Commonwealth of Massachusetts
- Installer is a certified Primary Installer in the MassCEC Clean Heating and Cooling Program – Small Scale Air-Source Heat Pump Program
- Installer has installed at least ten (10) cold climate air source heat pumps in Hampshire County

Once an Installer proposal passes threshold review, the proposals will be evaluated by the Northampton selection committee based on the following criteria:

- **Overall quality and value:** overall strength of statement of qualifications and specified equipment
- **Qualifications and Experience:** degree of Installer's experience and proficiency in executing the scope of work; demonstrated experience in installing cold climate ASHP systems and understanding of whole-home performance; certifications from third-party entities specific to ASHPs; experience in supporting outreach activities
- **Staffing and Work Plan:** ability and adequate staff to support the site evaluation and equipment installation for the Program; reasonable schedule and work plan for the tasks identified and demonstrated ability to meet increased customer demand; ability to provide timely, quality customer service and installations as well as ability to work well with the community; quality of proposed marketing and outreach strategy
- **Price and price structure:** quality, transparency, and simplicity of base purchase price and installation adders; proposed discount offered; clarity of customer quote; value of contract terms and conditions

At Northampton's discretion, prospective Installers may be requested to participate in an interview to address any potential questions or clarifications outlined in the proposals. Installers will be notified if they are requested to participate in an interview.

CONTRACTUAL REQUIREMENTS:

Upon the RFP review team's selection of a proposal, Northampton and each selected Installer will execute an agreement, which will set forth the respective roles and responsibilities of the parties and bind the Installer to the pricing, terms and conditions set forth in their statement of qualifications.

In addition to the Indemnification clause in the City of Northampton Standard Contract General Conditions, Installers will be required to include a clause in customer contracts signed through the program that states that the customer shall not hold the City liable or responsible for any issues related to the installation.

WAIVER AUTHORITY:

Northampton reserves the right, at their sole discretion, to waive minor irregularities in submittal requirements, to modify the anticipated timeline, to request modifications of the application, to accept or reject any or all applications received, and/or to cancel all or part of this RFQ at any time prior to awards.

DISCLAIMER:

Northampton makes no guarantees as to the number of customer leads acquired or contracts signed through the Program. Northampton reserves the right to accept or reject any or all applications received, negotiate with all qualified applicants, cancel or modify the RFQ in part or in its entirety, or change the application guidelines, when it is in its best interests.

Attachment 1: Cover Sheet and Application Checklist

Please include all of the following documents listed in this checklist with your statement of qualifications. Failure to do so may result in disqualification.

- _____ Attachment 1: Cover Sheet and Application Checklist
- _____ Statement of Qualifications that includes all required sections described in Section III
- _____ Attachment 2: Price Proposal and Product Specifications
- _____ Attachment 3: References
- _____ Attachment 4: Example copies of standard agreement and customer quote
- _____ Attachment 5: Copies of relevant licenses, insurance, and certifications

Please acknowledge that your company or team meets all of the eligibility criteria outlined in section I-E:

- _____ I acknowledge that the company (or team) I am representing is (or includes) a Primary Installer participating in the MassCEC Clean Heating & Cooling Program that installs equipment eligible for MassCEC air source heat pump rebates.
- _____ I acknowledge that the company (or team that I am representing, including sub-contractors) includes at least one employee licensed to install ASHPs in accordance with all applicable federal, state, and local codes, standards, and permitting requirements and manufacturer specifications, and that the company (or team that I am representing) holds all necessary insurance. All relevant documentation of this is included in this statement of qualifications.
- _____ I acknowledge that the company (or team) I am representing has installed a minimum of 10 cold-climate air source heat pumps within Hampshire County and have provided no less than five customer references in this statement of qualifications.
- _____ I acknowledge that the company (or team) I am representing is able to provide the full range of services to Northampton residents and businesses described in the Scope of Work (Section II-A).

**** (BE SURE TO ACKNOWLEDGE ALL ADDENDA FOR THIS PROJECT BELOW) ****
ACKNOWLEDGEMENT OF ADDENDA:

I the undersigned certify that I am authorized to submit this proposal on behalf of [company name], which is a licensed contractor to install air source heat pumps in the state of Massachusetts.

Company Name:

Company Name

Authorized Signatory's Printed Name

Authorized Signatory's Signature

<hr/>	<hr/>
Title	Date

Attachment 2: Price Proposal and Product Specifications

Please complete the tables below detailing your proposed discounted fixed-fee costs for standard installation of cold climate air source heat pumps. Single-head ductless systems should be detailed in Table 1 in accordance with typical system sizes. Multi-head ductless and central systems should be detailed in Table 2 with capacity and assumptions provided. These per-unit-installed compensation rates should include **all equipment and non-equipment costs associated with the typical installation scope of work** (e.g. wall mounting/installation of raised platform, permitting, etc.).

Fees associated with additional material and labor for non-standard installations (adders) should be detailed in Table 3. Any additional non-standard cost adders beyond those provided should also be included.

For single-head and multi-head systems please assume the following (for purpose of providing a fair cost comparison between installers):

- 16 feet Line Hide or similar (Please include: one 90 degree ell, one wall inlet, one end fitting.)
- 20 feet line set
- Brackets with vibration dampening features for models mounted on house
- Exterior units must be mounted above the level of snow drifts typically experienced at the location of the installation
- Exterior unit to be installed on same wall as interior unit
- Exterior unit to be mounted on wood framed wall
- Home construction to be wood frame with clapboard or shingle siding
- No rain cap is necessary

Table 1: Compensation for Standard Installation of Single-head Ductless Cold Climate Air Source Heat Pump

Manufacturer	Capacity	Model Number	Installed cost per unit
	9,000 Btu/hr		
	12,000 Btu/hr		
	15,000 Btu/hr		

	18,000 Btu/hr		

Table 2: Compensation for Standard Installation of Central or Multi-head Ductless/Ducted Cold Climate Air Source Heat Pump

Manufacturer	Capacity and number of indoor heads (if applicable)	Model Number	Installed cost per unit

Please note any additional assumptions regarding pricing of multi-head ductless/ducted systems below:

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Table 3: Additional Material and Labor Compensation, excludes Fixed-Fee Costs (include additional adders in blank rows provided)

Non-Standard - Additional Material/Labor Description	Unit Description	Installed Cost per Unit
Installation of an electrical subpanel		
Outdoor GFCI outlet		
Per foot price for mini-split line set beyond 20 ft.		
Per foot price for mini-split line hide beyond 16 ft.		

Construction of raised platform for mini split when exterior wall mounting is not possible (per outdoor unit – describe material used)		
Installation of a remote/smart thermostat and interface		
Installation of a pan heater		
Installation of metal rain cap on units within drip-line of roof		
Extended warranty		
Service plan		

In the section below clarify if/how pricing will be handled for installations that require additional material or labor beyond the proposed standard work scope.

Warranties

For the systems detailed above, please describe the warranties offered.

Attachment 3: Reference List

Installer Name: _____

RFQ Title: _____

Installer must provide a list of at least 5 client references and their contact information. References must be able to comment on their satisfaction with their ASHP installations, Installer business practices, and customer satisfaction.

Name:	Date(s) of services provided:
Address:	Phone:
	Email:
Description of services provided	

Name:	Date(s) of services provided:
Address:	Phone:

	Email:
Description of services provided	

Name:	Date(s) of services provided:
Address:	Phone:
	Email:
Description of services provided	

Name:	Date(s) of services provided:
Address:	Phone:
	Email:

Description of services provided

Name: 	Date(s) of services provided:
Address: 	Phone:
	Email:
Description of services provided 	

Attachment 4: Example copies of standard agreement and sample quote

Please attach example copies of the standard agreement and sample quote which will be provide to customers participating in the Program.

Attachment 5: Copies of relevant licenses, insurance, and certifications

Please attach copies of relevant licenses and insurance for the Installer to confirm ability to legally provide ASHP installation services in Massachusetts. Please also attach any relevant certifications or trainings for key personnel who will be involved in installation of ASHPs in the Program.